



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Property Assessment Division Management Analyst

Job Code Title

Management Analyst

Pay Band

07

Job Code Number

131817

Property Assessment Division

Management, Analysis, and Support Office

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state agency liquor stores and administers the laws governing the sale, taxation, and licensing of alcoholic beverages and tobacco products; returns unclaimed property to its rightful owners; and determines how state taxes and liquor and tobacco laws apply to Indian Tribes and tribal members in Indian Country.

The Property Assessment Division is responsible for administering Montana's property tax laws, including the valuation and assessment of real and personal property throughout the state for property tax purposes. The division is responsible for ensuring that all classes of property in the state are valued uniformly and equally throughout the state. The work of the division is critical to the operation of local governments, since the resulting valuation is used annually to fund important services provided by local government, including public schools, law enforcement, fire protection, road and bridge construction and maintenance, transportation, weed control, and public assistance. The functions of the division are performed by staff statewide in four regions with offices in each of the 56 counties and the Management Analysis Bureau and the Management, Analysis, and Support Office located in Helena. The Management, Analysis, and Support Office oversees the daily management of the division. This group of staff consists of the administrator, deputy division administrator, management analysts, management officer, and division support staff.

Job Responsibilities

The Management Analyst provides leadership and direction for division research; analysis; and program and policy development projects. The incumbent is the primary point of contact with internal and external customers and provides technical assistance related to division program or project areas. The position reports to the Deputy Division Administrator.

There are several of these positions and each specializes in a particular function of the division and performs the following tasks and duties in support of that function. Each function requires specialized knowledge in that area. Nothing in this job profile limits management's ability to assign and reassign functional areas based on division needs and individual knowledge and skills.

- **Program and Policy Development 60%**

1. Develops and conducts special studies and projects related to specific programs. Determines if substantive programmatic changes are needed. Documents, tracks, and resolves operational issues. Identifies tactical and strategic issues. Quantifies cost and time requirements. Arranges for allocation of resources. Implementing quality assurance programs.

2. Develops operational policies and long range strategic goals and objectives for division programs. Designs and implements organizational and operational changes to ensure the efficient development and operation of all program functions.
3. Develops, implements, and revises project implementation plans, goals, and strategies. Presents project updates to division leadership; covering key programmatic information. Develops project status reports; schedules; resource allocation recommendations; policy, rule, and legislative recommendations; and cost and time estimates.
4. Develops quality assurance programs and policies to ensure consistency; adherence to established standards and procedures; and the attainment of organizational goals and objectives. Performs needs analyses of targeted programs or projects; formulates recommendations and programmatic changes; and presents findings to division leadership.
5. Evaluates the effectiveness of division program activities and policies to ensure that goals are being attained and resources are being used effectively. Recommends and implements program modifications or necessary program realignments to ensure goals are realized. Develops and implements assessment and appraisal methodologies. Benchmarks accomplishments against other state and national projects.
6. Evaluates property assessment and valuation issues to develop policy solutions and provide guidance to staff and managers. Serves as an instructor for staff in the methods and techniques of property valuation and assessment; in procedures required for the correct use of appraisal, assessment, and valuation manuals; and for accurate collection of information. Provides technical assistance and training to ensure that new legislation is properly implemented.
7. Coordinates with program managers and information technology staff on the maintenance, enhancement, and development of computer assisted appraisal, assessment, and GIS applications for on-line classification, valuation, and assessment of residential, agricultural, commercial, and personal property.
8. Establishes and oversees the maintenance of division documentation, recordkeeping systems, and information systems as they pertain to statutes, administrative rules, policies, and procedures. Coordinates the development of data transfer, storage, and retrieval systems, both for paper and electronic data. Ensures project recordkeeping complies with the applicable regulations and professional standards as they may apply to the project. Works closely with information technology staff to ensure the secure dissemination and transfer of information from the databases adheres to all applicable department policies and business standards.
9. Develops and updates property manuals, schedules, and procedures that will serve as a basis for statewide determination of value. Designs assessment and appraisal forms and procedures that allow for ease of use by taxpayers and staff, including obtaining input from work group members and review meetings. Responds to inquiries by field staff and provides professional and technical assistance regarding the development and use of appraisal and assessment manuals, forms, schedules, and guidebooks.
10. Analyzes extensive data and develops Computer Assisted Land Pricing (CALP); statewide cost and depreciation tables for both real and personal property; and market models and income models for determining the value of all types of property. Provides technical assistance and training to regional managers, area managers, and lead appraisers in developing local CALP models, cost and depreciation tables for both real and personal property, market models, and income models. Develops appropriate productivity valuation schedules for agricultural and forest lands.
11. Performs the most complex appraisal and assessment work in situations requiring technical expertise. Provides assistance throughout the division.
12. Testifies at appeal hearings as an expert witness. Offers testimony to substantiate the reasoning, methods, and procedures used in developing the manuals and schedules. The testimony could include the valuation of specific properties, property exemptions, incentives, and abatements.
13. Conducts research, data collection, and data analysis to develop reports, policy papers, and recommendations regarding division operations. Determines how to measure efforts and develops recommendations for the Division Administrator, Deputy Division Administrator, Deputy Director, Director, Governor's Office, and Legislature.

14. Develops, updates, and implements administrative rules as required by the Montana Administrative Procedures Act (MAPA) to reflect changes in legislation and legislative intent. Develops, updates, and implements internal procedures necessary to ensure the department meets its statutory responsibilities.
15. Develops goals and objectives to ensure timely and accurate completion of the cyclical reappraisal of real property.
16. Works extensively with division and department leadership on assigned projects. As the project liaison for internal and external customers, prepares and presents project updates; provides regular project status reports, including schedules, costs and issues; estimates cost and time requirements of work; and monitors project outcomes and quality assurance activities.
17. Develops performance standards. Implements and monitors division performance measures to determine each program's effectiveness and efficiency. Coordinates and develops uniform audits. Ensures work is performed within industry and agency standards.

- **Communication and Technical Assistance 35%**

1. Serves as the primary point of contact with internal and external customers to ensure appropriate responses to inquiries and to provide technical assistance related to division program or project areas. Prioritizes requests for specialized information; develops training materials; and selects appropriate communication media and techniques.
2. Works extensively with legislators and the public on property tax issues. Testifies before legislative committees and administrative rule hearings. Provides analysis of the impacts of comprehensive major tax reform proposals; fiscal impact analysis on proposed constitutional initiatives; and fiscal notes on the impact and administrative costs of proposed legislation.
3. Determines the training needs of division staff through analysis of program effectiveness; new standards, specifications, technologies, and policies; and staff performance. Prepares, presents, and coordinates training for staff to ensure that modern technologies and operational strategies are available. Researches, evaluates, designs, and develops training materials for staff as needed; provides training to staff; coordinates preparation of training manuals and materials.
4. Serves as member of the division's management team to provide professional consultation and technical expertise on division-wide planning; budgeting; resource allocation; goals and objectives; program functions and operations; and controversial, unusual, and unprecedented issues effecting division operations and activities.
5. Speaks to public groups concerning appraisal, assessment, and valuation policies, procedures, schedules, administrative rules and on-line computer assisted mass appraisal. This may require an explanation of procedures utilized in the property classification and valuation process as well as listening to and addressing arguments and comments made by interested parties.
6. Meets with division stakeholders to review, discuss, and propose policies, forms, directives, memos, manuals, and schedules and solicit input.
7. Researches supporting information and prepares drafts of directives and memos in response to questions and concerns from taxpayers, legislators, and other government officials for signature by area managers, regional managers, deputy division administrator, division administrator, deputy director, director, or governor.

- **Other Duties as Assigned 5%**

1. Performs other duties as assigned by the supervisor.

Job Requirements

To perform successfully as a management analyst, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. It is essential that incumbent has deductive and inductive reasoning abilities to solve complex problems. Incumbent is required to make decisions based on the relative costs and benefits of potential actions. Skills in conducting needs assessments; developing effective training materials; using logic and reasoning to identify the strengths and weaknesses of alternative solutions; multi-tasking; paying attention to details

and accuracy; managing multiple priorities under tight deadlines; mathematics; providing timely and effective written, verbal, and interpersonal communication; researching and analyzing data from multiple sources; analyzing various financial, technical, and legal documents; customer service; resolving contentious situations; following written and oral directions and instructions; and word processing, spreadsheet, and database applications are required. The incumbent is required to develop feasible solutions considering available resources and organizational values. This position may work with confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires thorough knowledge in mass appraisal methodology; appraisal principles, techniques, and theories; computer assisted mass appraisal system software, integrated information systems, and other pertinent computer and communication technology and skills. Knowledge of the concepts and theories of public administration and communication; research and analysis methodologies; budgeting; business and management principles; operational and program planning; quality assurance methods; revenue sources and market trends; applicable federal and state statutes, administrative rules and departmental policies, rules, guidelines and procedures; organizational development and analysis; customer service standards; training methods and techniques; technical writing; and effective communication strategies and techniques.

- Depending on the specialty area assigned to an incumbent, additional knowledge and skills are required in one of the following:
 - Agricultural and forest land valuation
 - Commercial property appraisal and assessment
 - Cost factor development
 - Market modeling
 - Geographic Information Systems
 - ORION support
 - Personal property valuation
 - Project management, including legislative support, training, and rules development
 - Exemptions and appeals
 - Microsoft Project support and maintenance
- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in public administration, business administration, accounting, mathematics, statistics, finance, economics, or closely related field and five years of experience including two years of specialized experience in the assigned area.
 - Work experience must include program planning, analysis, and policy development.
 - Experience in property appraisal and assessment is preferred.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public,

other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.

- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Work hours may exceed 40 hours per week from time to time. May involve minimal travel therefore a valid Montana driver's license is required. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Cynthia Monteau Moore, Division Administrator Date: May 2011

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: May 2011

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____